FaxPress™

The Integrated Network Fax Server



FaxPress Xerox Interface Guide



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Contents

Introducing the FaxPress Xerox Interfac	e 1-1	
Overview		_ 1-2
About the FaxPress Xerox Interface Scanning Documents for Outgoing Faxes _		1-3 1-3
Printing Incoming Faxes and Notices		1-3
System Requirements Overview of Installation and Configuration F	Procedu	res 1-5
Creating Fax Repository	2-1	
Overview		2-2
Overview Creating the Fax Repository Folder		_ 2-3
Configuring Server Fax Kit	3-1	
Overview		_ 3-2
Setting up the Server Fax Kit on Your Xerox	Systen	ո. 3-3
Xerox Print Driver Setup	4-1	
Overview		4-2
Installing Xerox Print Drivers		4-3
Configuring the Xerox Print Driver		_ 4-10
Setting up Paper Colors on the Xerox Syste	em	4-13
Installing the FaxPress Xerox Interface	5-1	
Overview		5-2
Installing the FaxPress Client Software		5-3
Creating FaxPress Users for Each Fax Repo		
Installing the FaxPress Xerox Interface Softv	ware	5-4
Configuring the FaxPress Xerox Interface _		
Accessing the FaxPress Xerox Interface Co	onfigura	tion Utilit

Index	IX-1

Introducing the FaxPress Xerox Interface

What's In This Chapter	
Overview	1-2
About the FaxPress Xerox Interface	1-3
Scanning Documents for Outgoing Faxes	1-3
Printing Incoming Faxes and Notices	1-3
System Requirements	1-4
Overview of Installation and Configuration Procedures	- 1-5

Overview

This chapter describes:

- The features and functions of the FaxPress Xerox Interface.
- How users can scan documents and send them as faxes over the local area network, via the FaxPress server.
- How users can set up the Xerox machine to print out incoming faxes and fax notices.
- An Overview of the setup procedures for installing and configuring the software and hardware needed for the FaxPress Xerox Interface

About the FaxPress Xerox Interface

Castelle's FaxPressTM Xerox Interface provides a means for users of certain models of Xerox printer-scanners to scan printed documents and deposit the digital versions of these documents in a repository directory for subsequent faxing via the FaxPress server. Users can also print out faxes received via the FaxPress server on the Xerox machine, and print notifications for outgoing faxes on the Xerox system. Note that although the FaxPress Xerox Interface is supported on some models of Xerox Document Centre systems, the term 'Xerox WorkCentre Pro' is used throughout the procedures in this Guide.

Scanning Documents for Outgoing Faxes

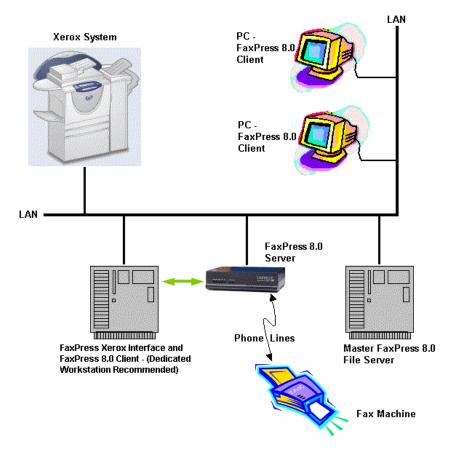
When the FaxPress Xerox Interface has been set up, users can feed a paper document into the scanner tray of a Xerox WorkCentre Pro (or Document Centre), and press the 'Fax' button, then enter the necessary recipient information, such as the fax number, to send the fax via the FaxPress server.

Printing Incoming Faxes and Notices

When the FaxPress Xerox Interface has been set up, incoming faxes can be printed out on a Xerox WorkCentre Pro (or Document Centre), and notices regarding outgoing faxes can also be printed.

System Requirements

The FaxPress Xerox Interface is designed to run on a Local Area Network with the equipment shown in the Figure below.



In order for the FaxPress Xerox Interface to function properly, the following system requirements must be met.

• The FaxPress server must be running software version 8.0 or later. Keep in mind that although the SBE series FaxPress servers running FaxPress 8.0 support the FaxPress Xerox Interface, they do not support email functions.

- The Xerox WorkCentre Pro or Document Centre must be a model that supports the Xerox Server Fax Kit.
- The FaxPress server must be configured in compliance with the requirements of your local telephone service provider.
- The FaxPress Xerox Interface workstation must be running one of the following operating systems: Windows NT 4.0 Workstation or Server, Windows 2000 Pro or server, Windows 2003 Server, or Windows XP; it must have a Pentium III 500 MHz CPU or faster (or equivalent CPU), 256 MB of RAM and at least 256 MB of free space on its hard drive. The FaxPress Xerox Interface will perform best if this workstation is dedicated, but it will run on any workstation or server that meets the above requirements.
- You must have a local area network (Windows NT or Novell) to which you can connect your FaxPress server, the Windows workstation on which the interface will run, and the Xerox WorkCentre Pro.

See the FaxPress and Xerox Administrator Guides for details.

Note: The requirements listed above are for a minimal FaxPress Xerox Interface; you can connect several Xerox systems to a FaxPress server, and for high-volume faxing, more than one FaxPress server can be configured for use with numerous Xerox systems.

Overview of Installation and Configuration Procedures

To set up your FaxPress server and Xerox WorkCentre Pro system for the FaxPress Xerox Interface, complete the following procedures.

- 1. Connect the FaxPress server hardware and the Xerox WorkCentre Pro system to the same segment of your LAN.
- Create a Fax Repository for each Xerox system connected to your LAN, placing these repositories on the Windows workstation you plan to use for your FaxPress Xerox Interface (preferably, a dedicated PC).

- 3. Configure the Server Fax Kit on each Xerox WorkCentre Pro.
- 4. Install and Configure the necessary Xerox print drivers.
- Install the FaxPress Client software on the workstation that you intend to use for this FaxPress Xerox Interface, and create a Fax-Press user for each WorkCentre Pro
- 6 Install the FaxPress Xerox Interface software on the workstation
- 7. Configure the Fax Press Xerox Interface software, using the Fax-Press Xerox Interface Configuration utility.

After completing these procedures, test the system by scanning a document and sending a fax, then sending a fax to a user on the local area network who is registered in the system's user map, then checking the notices generated for these transactions.

Creating Fax Repository

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What's In This Chapter	
Overview	2-2
Creating the Fax Repository Folder	2-3

Overview

This chapter describes:

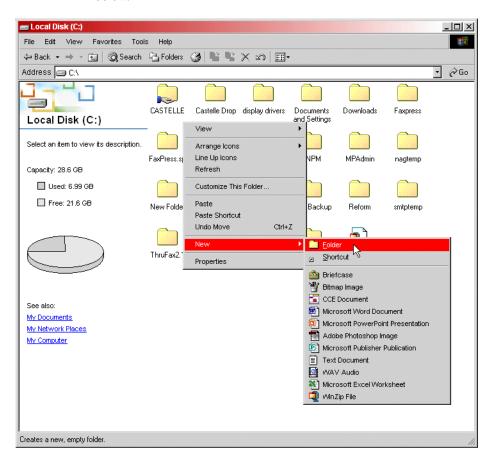
• How to create a Fax Repository folder on a workstation that will be your FaxPress Xerox Interface host machine

Creating the Fax Repository Folder

Take the following steps to create the folder where all fax files that have been scanned on each Xerox WorkCentre Pro will be stored until they are sent out by the FaxPress server.

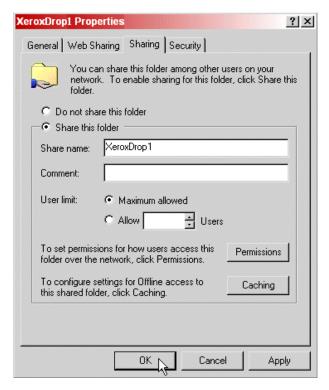
- 1. Open Windows Explorer on the workstation you plan to use as the FaxPress Xerox Interface machine.
- 2. Browse to the hard drive on which you plan to create the Fax Repository folder. This workstation and the hard drive should meet the **System Requirements on page 1-4**. Typically, it will be the same workstation you have selected as the FaxPress Xerox Interface machine, but it may also be a network server on the same network with your Xerox system.

Right-click on a blank space in the window displaying the contents of your chosen hard drive, and select New>Folder, as shown below.



- Give the folder a unique, meaningful name, such as XeroxDrop1 (if you have several Xerox WorkCentre Pro systems, create repository folders for each, with names such as XeroxDrop2, XeroxDrop3, etc.).
- Right-click on the XeroxDrop1 folder and select the **Properties** option.

6. Click the **Sharing** tab.



- Click the radio button for Share this folder, and enter a unique, meaningful Share name, such as XeroxDrop1. See the figure above
- 8. Click **OK** to confirm these settings for the XeroxDrop1 folder.
- 9. Repeat this procedure for each Xerox WorkCentre Pro on your LAN, creating a unique fax repository folder for each system

Configuring Server Fax Kit

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What's In This Chapter	
Overview	3-2
Setting up the Server Fax Kit on Your Xerox System.	 3-3

Overview

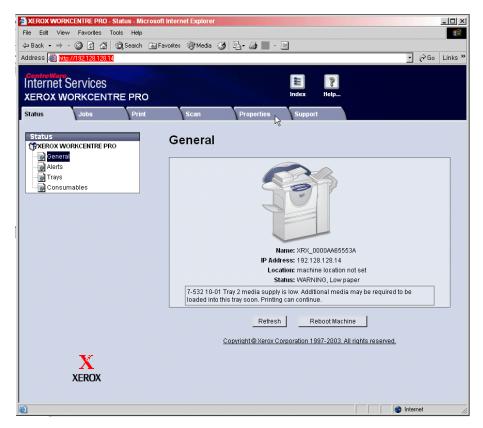
This chapter describes:

 How to set up the Server Fax Kit on your Xerox WorkCentre or Document Centre system.

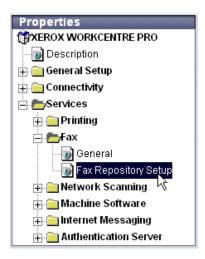
Setting up the Server Fax Kit on Your Xerox System.

After you have set up the Xerox WorkCentre or Document Centre system on your local network, assign the unit a static IP address. Then take the following steps to configure the Server Fax Kit for operation with the FaxPress server and the FaxPress Xerox Interface.

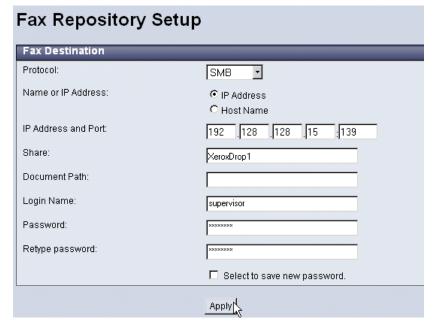
- 1. Open your Web browser on a workstation connected to the local network.
- 2. Type the static IP address of the Xerox system in the address bar of the Web browser; for example, http://192.128.128.14. When you press enter, a screen similar to the figure below will appear.



3. Click on the Properties tab, then expand the Properties tree to reveal the Services and Fax folders, as in the figure below.

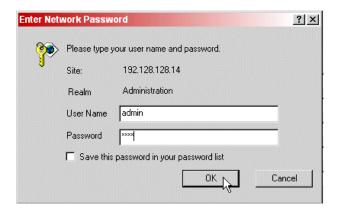


4. Select the **Fax Repository Setup** item, as shown. A setup window will appear, as shown below.



- 5. From the **Protocol** pull-down menu, select **SMB**. this is the Windows share option. There are also options for TCP\IP (FTP), and Netware
- Click the IP Address radio button, then specify the IP address of the workstation on which you set up the fax repository in Creating the Fax Repository Folder on page 2-3.
- 7. In the Share text box, enter the Sharename of the fax repository folder you created in Creating the Fax Repository Folder on page 2-3. XeroxDrop1 is used in the Figure above.
- 8 Leave the **Document Path** field blank
- Enter the Login Name and Password of a user account on the
 workstation or server where the repository folder is located (typically, the FaxPress Xerox Interface workstation). Castelle recommends that you use the workstation's local administrator account.

10. Click **Apply**. A login dialog box appears.



11. The User Name and Password of the account required for the Xerox system are entered in the appropriate text fields. By default, the User Name is **admin** and the password is **1111**. Leave these fields at their default settings and click **OK**.

After you have made these settings and installed and configured the FaxPress Xerox Interface as described in the next chapter, faxes will be routed to the fax repository folder. When you send a fax from the Xerox system, a ****.XSM folder will appear in the repository folder. the **** will be a number starting with 0001.XSM and incrementing as you send more faxes.

Xerox Print Driver Setup

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Overview	4-2
Installing Xerox Print Drivers	4-3
Configuring the Xerox Print Driver	4-10
Setting up Paper Colors on the Xerox System	 4-13

Overview

This chapter describes:

- How to install printer drivers for printing on your Xerox system from the Faxpress Xerox Interface workstation and Faxpress user workstations.
- How to configure the Xerox printer driver on the FaxPress Xerox Interface workstation and Faxpress user workstations.
- How to set up the Xerox system to print incoming faxes and fax notices on different colors of paper.

Installing Xerox Print Drivers

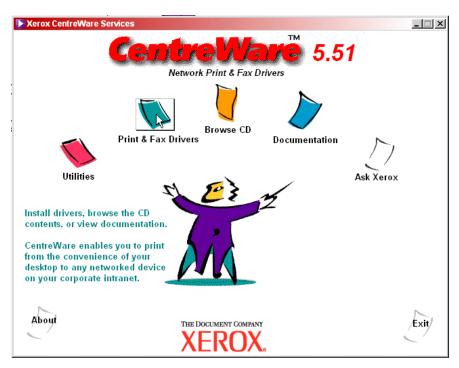
Use the following procedure to install the printer drivers for printing on your Xerox system on the FaxPress Xerox Interface workstation, and the workstations of all users who wish to print faxes, fax notifications, or other documents on the Xerox system.

Insert the Xerox CentreWare print and fax driver CD into the CD-ROM drive on your workstation. The CD will be labelled Centre-Ware 5.55 Print and Fax Drivers (version number will vary). The CentreWare welcome screen appears.



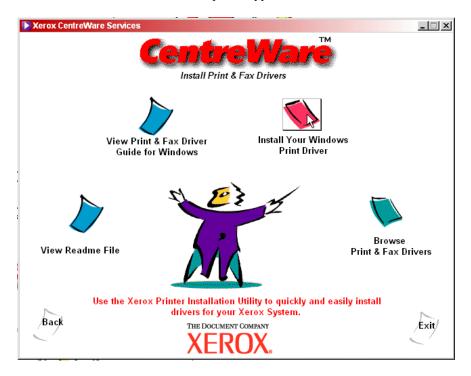
2. Select your language and click **OK**.

3. A set of installation options appears.



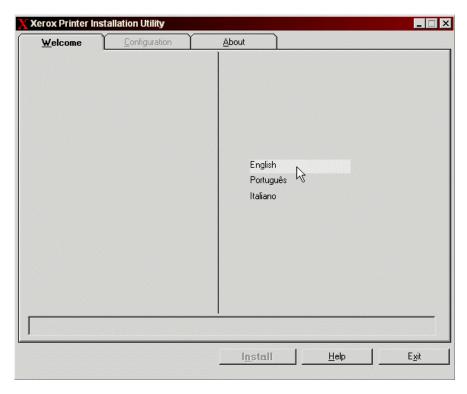
4. Click the Print & Fax Drivers option, as shown.

5. A set of Print and Fax options appear.



6. Click Install Your Windows Print Driver.

7. The Printer Installation Utility screen appears.

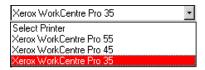


8. Click on the appropriate language option.

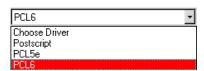
Xerox Printer Installation Utility Welcome Configuration About English ▼ Install Documentation Select Printer Choose Driver Printers Drivers Connection Replace Driver Default Printer Configuration File... System Drive C: Free Space 21,631 MB Install Help Exit

9. The Configuration tab appears.

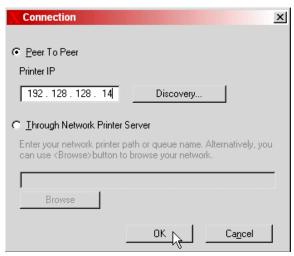
10. Select your Xerox system from **Select Printer** pull-down menu.



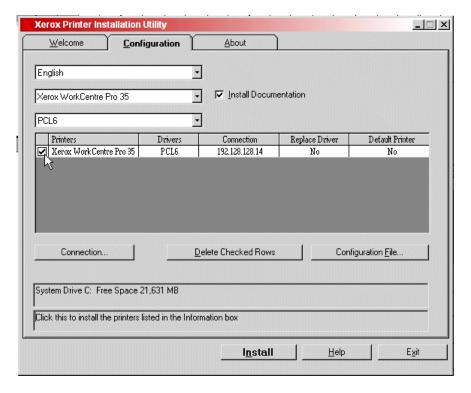
11. Select the print driver for this printer from the **Choose Driver** pull-down menu.



12. Click the **Connection** button. The Connection dialog box opens.



13. Enter the IP address of the Xerox system, then click **OK**.



14. The Configuration tab reappears.

- 15. Check the checkbox to the left of your printer in the list box, as shown.
- 16. Click the **Install** button to install the driver.

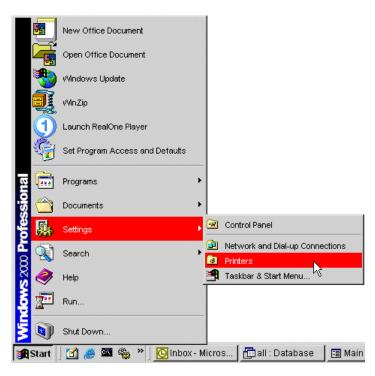
To configure the installed driver, continue with the next section of this chapter.

Configuring the Xerox Print Driver

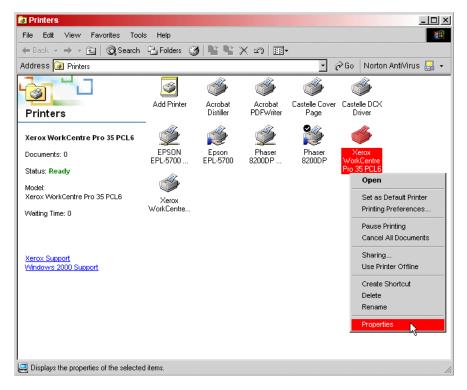
Take the following steps to configure the Xerox Print driver once you have installed it on the FaxPress Xerox Interface workstation or a user's workstation.

1. From the Windows desktop, choose the command:

Start>Settings>Printers

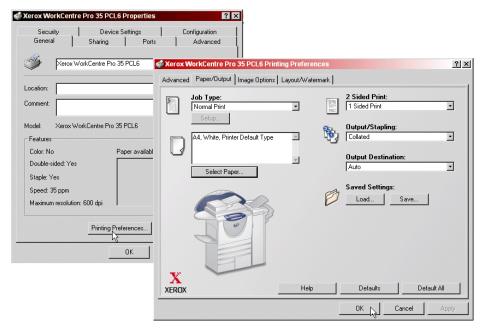


 $2. \ \ The \ Printers \ window \ opens, \ displaying \ all \ available \ printers.$



 $3. \ \ Right\text{-}click \ on \ the \ Xerox \ system \ icon \ and \ select \ \textbf{Properties}.$

4. The Properties screen for the Xerox system appears. Click the **Printing Preferences** button to open the Preferences screen.



- 5. Typically, you can leave all the settings at their defaults. One exception; if you have enabled Network Accounting on your Xerox WorkCentre Pro, you must specify the default User ID and the System ID in the Device Settings tab (Accounting>Setup) of the printer driver properties. If your situation requires special settings, make them with caution. Castelle recommends that you do NOT change any of the advanced options unless you ar certain that the changes will work without any unwanted side-effects.
- 6. When you have the settings as you want them, click **OK**.
- Test the printer from the workstation, and test printing a fax or fax notification.

If you want to set up the Xerox system so it prints faxes and/or fax notifications in special colors proceed to the next section of this chapter.

Setting up Paper Colors on the Xerox System

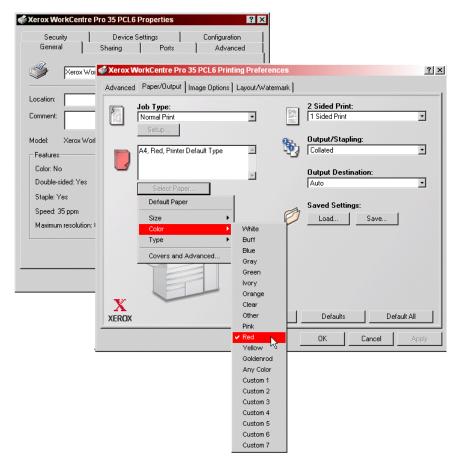
If you wish to use more than one paper color when printing with the FaxPress Xerox Interface - for example, one color for fax print-outs, and another color for fax notices - take the following steps. This procedure assumes that you have 2 trays with different colored paper in your Xerox system.

Note: This procedure requires that the FaxPress Xerox Interface software be installed on your FaxPress Xerox Interface workstation. See Chapter 5 "Installing the FaxPress Xerox Interface" for details.

- For each special paper color, create an extra local print driver for your Xerox system on your FaxPress Xerox Interface workstation, using the procedure in Installing Xerox Print Drivers on page 4-3.
- 2. Rename the extra printer drivers for each color. For example, if you have a driver you want to use for Red paper, first choose

Start>Settings>Printers

- In the Printers window, select the new driver you have created and add RED to the name; so Xerox WorkCentre Pro 35 PCL6 would become Xerox WorkCentre Pro 35 PCL6 RED.
- 4. Rename each of the drivers for the different colors in this way.
- Open the Properties screen for each driver, then click the Printing Preferences button to open the Preferences screen, as you did in "Configuring the Xerox Print Driver" earlier in this chapter.



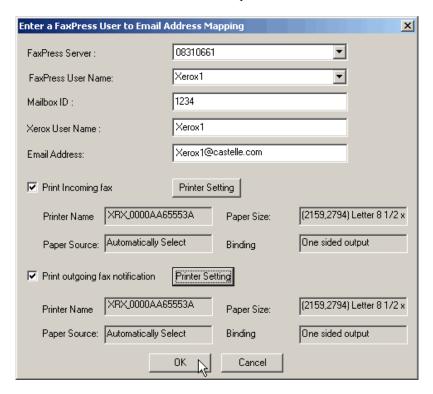
6. The Printing Preferences screen opens.

- 7. Set the paper color for the driver as shown. Click **OK** in the Preferences screen, and **OK** in the Driver Properties screen.
- 8. Open the FaxPress Xerox Interface configuration utility, with the command

Start>Programs>FaxPress>Add On Products>Xerox Interface>Configuration

9. In the User Map tab, select a user, for example, Xerox1, then click the **Edit** button. This Step and those that follow require that you

- have installed the FaxPress Xerox Interface software. See Chapter 5 "Installing the FaxPress Xerox Interface" for details.
- 10. In the User to Email address Mapping dialog box you can set up each printer setting for **Print Incoming fax** and **Print outgoing fax notification** with a different print driver.



- 11. To set the RED driver for Incoming faxes, click the Printer Setting button for Print Incoming fax. Then choose the driver that ends in RED from the Printer Name pull-down menu and click OK. See the procedure in Configuring the FaxPress Xerox Interface on page 5-9 for details.
- 12. Repeat this procedure for the other color driver, this time clicking the **Printer Setting** button for **Print outgoing fax notification**.

Incoming faxes and outgoing fax notifications will now print out on different colored paper.

Installing the FaxPress Xerox Interface

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What's In This Chapter	
Overview	_ 5-2
Installing the FaxPress Client Software	
Creating FaxPress Users for Each Fax Repository	5-3
Installing the FaxPress Xerox Interface Software	5-4
Accessing the FaxPress Xerox Interface Configuration	_ Utility5-21

Overview

This chapter describes:

- How to install the Client software on the Windows workstation you intend to use for the FaxPress Xerox Interface.
- How to create FaxPress Users for each Fax Repository on your FaxPress Xerox Interface workstation
- How to Install the FaxPress Xerox Interface software on the Windows workstation you intend to use for the FaxPress Xerox Interface.

Installing the FaxPress Client Software

The procedures in this section assume that you have met the requirements listed in **System Requirements on page 1-4**.

Before you can install the FaxPress Xerox Interface software, you must have the FaxPress Client installed on the Windows workstation you intend to use as your FaxPress Xerox Interface.

See your FaxPress Administrator's Guide for Client software installation details.

Creating FaxPress Users for Each Fax Repository

Before you can map Xerox users to FaxPress users in order to connect to and use the Fax Repository folder you created in **Creating the Fax Repository Folder on page 2-3**, you must create the appropriate FaxPress users. One naming scheme that makes sense, especially if you have more than one Xerox system, and therefore, more than one Fax Repository folder, is to give the FaxPress users names that relate to the names of the Fax Repository folders. For example, if you have named the Fax Repository folders XeroxDrop1, XeroxDrop2, etc., you can name your FaxPress users Xerox1, Xerox2, etc. Remember that these same names must be used as the Xerox User names when you do your user mapping for the FaxPress Xerox Interface, as described in **Configuring the FaxPress Xerox Interface on page 5-9**. For details on adding FaxPress users, see the FaxPress Administrator's Guide.

Installing the FaxPress Xerox Interface Software

The procedures in this section assume that you have met the requirements listed in **System Requirements on page 1-4**, and that you have created a Fax Repository folder for each Xerox WorkCentre Pro on your system, as described in **Creating the Fax Repository Folder on page 2-3**.

Take the following steps to install the FaxPress Xerox Interface software.

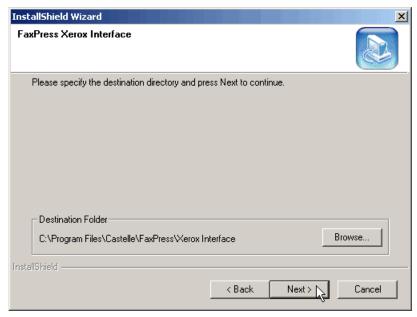
- 1. Create a folder on the C: drive of the workstation you will use for the FaxPress Xerox Interface, and name the folder Xerox.
- 2. Download the file FXI_Install.zip from the Castelle Web site.
- 3. Place this file in the Xerox folder.
- 4. Double-click the FXI_Install.zip file. The files it dontains will self-extract, provided you have the WinZip program installed on your PC.

5. Double-click the Setup.exe file. The welcome screen for the InstallShield Wizard appears, as shown below.



6. Click Next.

The Destination Location screen appears. The Exchange Connector will be installed by default to C:\Program Files\Castelle\Fax-Press\Xerox Interface directory.



Click Browse to change this location or Next> to accept the default location and continue. User Information X The service must log on using a valid user account, either a user to "this computer", or a user to a NT domain, but both need Administrator user privilege, and had logged on from this computer at least once after FaxPress Client is installed. If user password is changed afterward, please change the password for the FaxPress Xerox Interface Service. If the user account is authenticated on an NT domain, please provide the domain name. Otherwise, if the user is authenticated on the workstation, leave the domain field blank. User Name: supervisor Password: ******** Confirm Password: Domain: < Back Next > Cancel

9. The User Information screen appears.

- 10. Enter the User Name and Password for a FaxPress user with Supervisor privileges who is also an authenticated user with Administrator privileges on the FaxPress Xerox Interface workstation. For simplicity, the name 'supervisor' is used in the example above. You do not need to enter the Domain of this user, since the user is authenticated on the FaxPress Xerox Interface workstation.
- 11. When you have entered the logon account information you want, click **Next**

12. The InstallShield installs the software, then the Complete screen appears.



- 13. Click Finish.
- 14. The FaxPress Xerox Interface Configuration screen appears. Continue with your setup of the FaxPress Xerox Interface, following the procedure in the next section of this chapter.

Configuring the FaxPress Xerox Interface

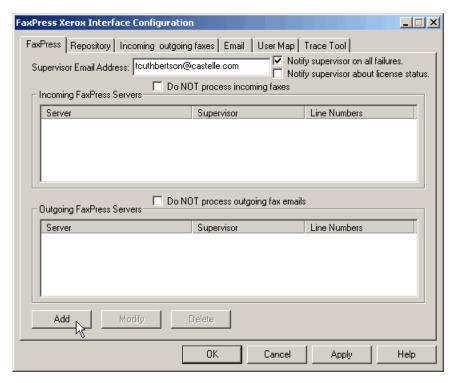
Use the following procedure to configure your FaxPress Xerox Interface. You will already be in the FaxPress Xerox Interface Configuration screen if you have just finished installing the FaxPress Xerox Interface software on the workstation you are using for it. If you have exited from the Installation/Configuration program, you can access the configuration utility by choosing this command:

Start>Programs>FaxPress>Add On Products>Xerox Interface>Configuration

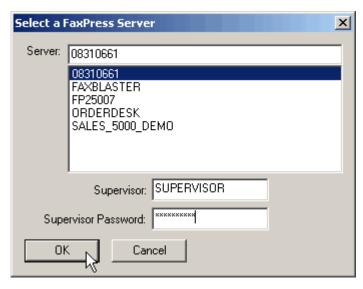
See Accessing the FaxPress Xerox Interface Configuration Utility on page 5-21 for details. Once you have accessed the FaxPress Xerox Interface Configuration screen, follow these steps.

1. The tabs in this screen let you make settings for your FaxPress Xerox Interface, so it can send and receive faxes from the Xerox system via the FaxPress server, and establish the mappings for

Xerox system users on the FaxPress server. Email and Trace Tool settings are also provided, for administrative purposes.

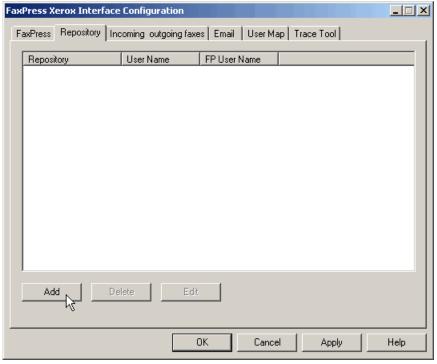


 In the FaxPress tab, click the Add button to add your FaxPress server to the lists of Incoming and Outgoing FaxPress Servers. If there are several FaxPress servers available, and you want to use more than one for the FaxPress Xerox Interface, add all servers you intend to use. 3. The FaxPress Server selection dialog box appears, displaying a list of available servers.

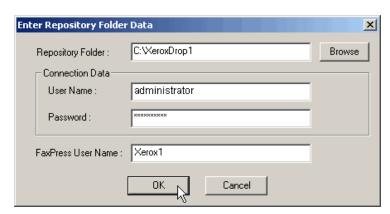


- 4. Select a server (or servers) in the list that is running version 8.0 or later FaxPress software, and enter the user name and password for the FaxPress supervisor for this server. Click **OK** when you are satisfied with your entries. The FaxPress tab appears again, with the added server listed in both Incoming and Outgoing FaxPress servers lists.
- 5. Repeat the last two steps of this procedure to add other available FaxPress servers.
- If you want the supervisor to be notified of fax failures, check the Notify supervisor on all failures checkbox and add the email address of the supervisor.

7. Click the **Repository** tab.



8. Click **Add** to specify a fax repository folder.



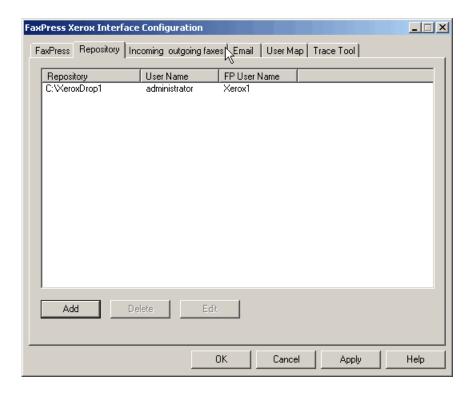
9. The Repository Folder Data dialog box appears.

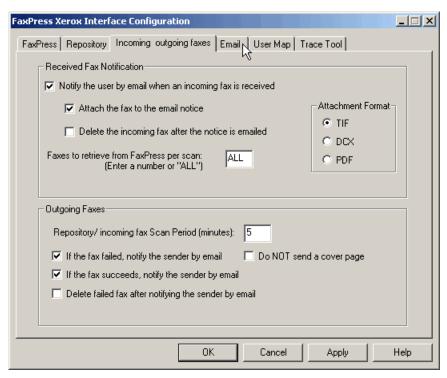
- 10. Browse to and select the fax repository folder you have created on the FaxPress Xerox Interface workstation. For details on this folder, see Creating the Fax Repository Folder on page 2-3.
- 11. Enter the User Name and Password of an authenticated user on the workstation, so the FaxPress Xerox Interface can connect to the fax repository folder. In the example above, the Administrator account name was used.
- 12. Enter a **FaxPress User Name**, to be used to send out the scanned fax jobs from the Xerox system if the sender's mail ID is not available. A user with a name related to the Fax Repository is an obvious choice, such as Xerox1 in the example above. If the fax is sent using this repository default user, printed notification of fax success and failure will be sent to the repository default user, too. If there are several Xerox WorkCentre Pro systems, each will have a unique drop directory (such as XeroxDrop2. XeroxDrop3, etc.) and each can have a default user for the fax repository (Xerox2, Xerox3, etc.). Each of these users must be mapped so they have the same FaxPress User Name and Xerox User name. See Step 19 and following in this procedure.

Note: To simplify printing of incoming faxes, you may want to route them all to a specific WorkCentre Pro; do this by assigning the incoming fax line to the default repository user (Xerox1 in the example above). To make this line setting, start Faxmain

(Start>Programs>FaxPress>Faxmain) then log in to the FaxPress server, right-click on it and choose Properties, then select the Line Settings tab, and in the Routing Type section, click the Assign Line to User radio button and select the default repository user (such as Xerox1) from the pull-down user menu.

13. Click **OK** when you have entered the settings you want. The Repository tab appears again, with the repository information listed.



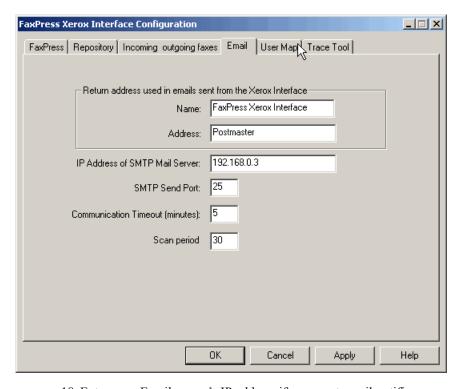


14. Click the **Incoming_outgoing faxes** tab.

- 15. Make the settings you want for the **Received Fax Notification** choices. If you choose to notify the recipient by email you can choose to **Attach the fax to the email notice**, and then choose the format for the attached fax from the radio buttons on the right. You can also choose to **Delete the incoming fax** after the notice (and attached fax) are emailed. Finally, if the Xerox system is unable to handle the number of faxes being received by the Fax-Press server, you can limit the number that are retrieved during each scan period. Typically, you can leave the default '**ALL**' setting.
- 16. Make the settings you want for Outgoing Faxes. Enter a Repository/incoming fax Scan Period in minutes; the FaxPress Xerox Interface will check this repository for outgoing fax jobs, and check the FaxPress server for incoming faxes at the specified

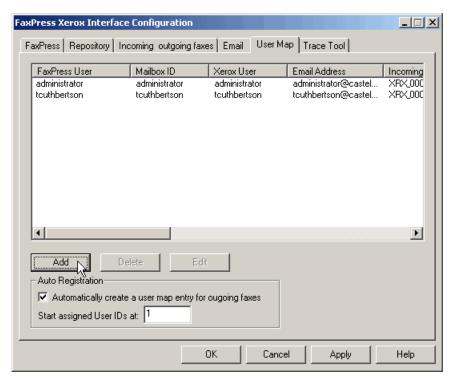
interval. Typically, you will want notifications to be sent for both successful and failed faxes, and you will want to leave the checkboxes for deleting failed faxes, and NOT sending cover pages unchecked, as shown.

17. When you have made the settings you want, click the **Email** tab.



18. Enter your Email server's IP address if you want email notifications concerning faxes to be sent from the FaxPress Xerox Interface. Leave the default settings for the Address of the interface, the SMTP port, the timeout, and the scan period, unless changes are required by special circumstances, and Castelle technical support asks you to make the changes.

 When you have made the email settings you want, click the User Map tab.

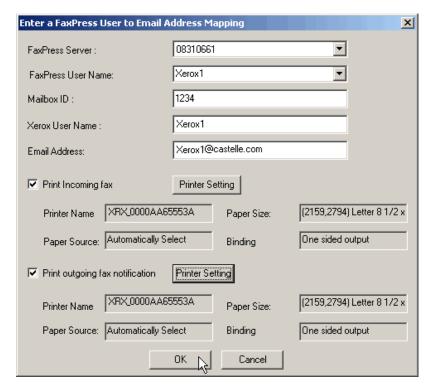


- 20. Leave the **Auto Registration** checkbox checked (the default), and the starting ID at '1'. Click **Add** to add user mappings to the list.
- 21. In the FaxPress User to Email Address Mapping dialog box, you can map a **Xerox User** to a **FaxPress User Name**.

Note: If you are configuring the FaxPress Xerox Interface for use with an SBE series FaxPress server, keep in mind that the email functions are not supported.

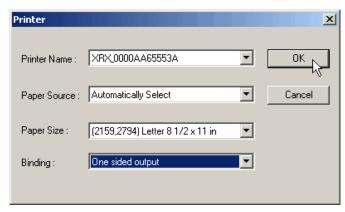
22. In the example below, the default FaxPress Fax Repository user for XeroxDrop1, Xerox 1, is mapped to the same Xerox User Name. you MUST create a user map such as this for each default

Fax Repository user for each Fax Repository, and the FaxPress User Name must be the same as the Xerox User name in each case.



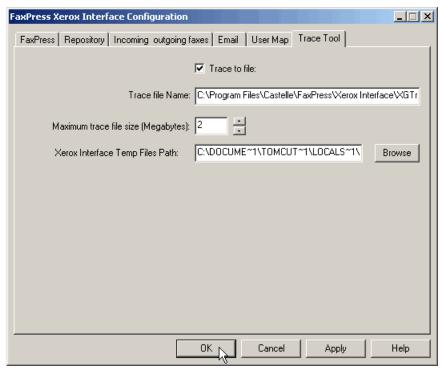
- 23. After mapping the user, you can enter their **Email Address** if you want them to get email notifications of received and outgoing fax events. Leave the Email Address field blank if you do not want them to receive email notifications.
- 24. Enter an optional mapping for any user who wants to use their mailbox ID to authenticate themselves when they are sending faxes from a Xerox WorkCentre Pro; if they are mapped as Xerox and FaxPress users, they can enter their mailbox ID, then the fax number of their recipient, and be authenticated to send the fax.

- 25. To set up the user for receiving print-outs of incoming faxes, check the Print Incoming fax checkbox, then click the Printer Setting button.
- 26. In the Printer dialog box, select the printer from the pull-down menu; typically, you will choose the Xerox system, as in the figure below



- 27. Select the **Paper Source**, **Paper Size**, and **Binding** settings that are the defaults for the printer, then click **OK**. The FaxPress User Mapping dialog box reappears, with the printer settings displayed.
- 28. Repeat this process to **Print outgoing fax notification** for the mapped user. Check the checkbox, click the **Printer Setting** button, and use the Printer dialog box to make the printer settings, then click **OK**. The FaxPress User Mapping dialog box reappears, with the printer settings displayed.
- 29. Click **OK** in the FaxPress User Mapping dialog box when you have completed all mapping and printer settings for the user. The User Map tab reappears, with the user added to the list. Repeat this process for each user you wish to map.
- 30. When all users are mapped, click the **Trace Tool** tab.

31. In the Trace Tool tab, you can check the **Trace to file** checkbox to log traces of fax transactions.

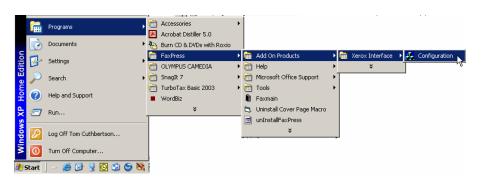


- 32. Enter a complete filename for the trace file, and a maximum size, then enter a path to the location for Xerox Temp files.
- 33. When you have completed all configuration settings for the Fax-Press Xerox Interface, click the **OK** button.
- 34. Send test faxes from the Xerox system, and send test faxes to Fax-Press users from a remote location, to make sure the FaxPress Xerox Interface is configured properly.

Accessing the FaxPress Xerox Interface Configuration Utility

To access the FaxPress Xerox Interface Configuration utility if you have exited the installation/configuration program, use the command:

Start>Programs>FaxPress>Add On Products>Xerox Interface>Configuration as shown in the figure below.



Index

Α	N
administrator account	network server, as interface
fax repository 3-5	machine 2-3
Xerox interface 5-7	notices 1-3
attached faxes 5-15	notification
Auto Registration, of users 5-17	received faxes 5-15
C	notifications 5-16
cover pages 5-16	0
CPU speed, requirement 1-5	operating system, required for Xerox
E	interface 1-5
email notice 5-15	P
email notifications 5-16	paper colors
F	configuration 4-13
fax	paper source and size, for printer 5-19
email notification 5-16	Password
notifications 1-3	for Fax Repository account 3-5
Fax Repository	printer drivers
creating 1-5	configuration 4-9, 4-10
setup 3-5	installing 4-3
Share name 2-5, 3-5	printing
FaxPress	fax success notification 5-13
server selection for Xerox	incoming faxes 1-3
interface 5-11	notices 1-3
server software requirement 1-4	preferences 4-12
supervisor 5-11	R
1	RAM, requirement 1-5
incoming faxes, color paper 4-15	S
Installation and Configuration,	scan period 5-15
overview 1-5	scanning documents, for faxing 1-3
IP address, of Xerox system 3-3	service provider, requirements of 1-5
L	Share name 3-5
local area network, requirement 1-5	Share name, fax repository 2-5
M	SMB, protocol 3-5
mapping, user 5-17	SMTP port 5-16
mannings 5-17	system requirements 1-4

```
Т
testing
    Xerox Interface 5-20
testing.
    Xerox interface system 1-6
Trace Tool 5-20
U
User Map 5-17
user mapping 5-17
X
Xerox Interface software
    accessing configuration utility 5-
             21
    configuration 1-6, 5-9
    destination location 5-6
    installation file 5-4
Xerox Interface workstation 1-6, 2-3,
3-5, 5-4, 5-7
Xerox print drivers
    configuration 1-6
    installation
                1-6
Xerox Server Fax Kit
    configuration 1-5
    requirement 1-4
XeroxDrop 2-4
XSM folder 3-6
```